



Strategic Plan September 2020—August 2023

Overall Vision Statement for the Trust

We are committed to the highest educational standards.

We will ensure that every child receives the very best possible pastoral care.

We are committed to creating structures and systems which allow our schools to perform to the highest levels.

We are committed to the growth of our trust and will actively seek to promote the trust's values and to be outward looking.

We believe in comprehensive education and we are committed to inclusion.

1.The Trustees	Key milestones	Who?	Comments Last Ammended Nov 2022
1.1 the Trust will come into existence in autumn 2020	November 1 st ? December 1 st ?	DLB BR VWV	DONE
1.2 In year 1 there will be 7 trustees BR presumed chair elect	Autumn 2020	BR DLB GS PH MH JP JM	DONE
1.3 Each trustee brings considerable experience and each has a strong skill set. We conducted a skills audit process in preparation for establishing the Trust. This will be reviewed regularly	Ongoing	BR/DLB/Trustees	Audit of skills in December 2021 Regular discussion at Full Trust
1.4 Each individual also displays the capacity to adopt a wider way of thinking i.e. as MAT trustees		ALL	Ongoing
1.5 Seven trustees is an appropriate number at the outset of the trust. This will enable depth of discussion, clear decision making and good policy development			Reviewed in Spring of 2022. Ongoing review

1.6 It also allows room for further recruitment in due course. We will only expand if there are suitable candidates available with the right skill set and strategic view.	Ongoing but more likely from summer 2021 onwards	DLB BR	Ongoing
1.7 If a suitable candidate emerges from the new school this would be worthy of consideration but trust policy will be that NO school should expect automatic representation on the board.			Ongoing
1.8 Nevertheless, overtime the current Balcarras “heavy” make-up of the board is likely to change. The 7 trustees have been appointed with their previous term of office carried over. This will provide stability because not all terms end at the same time. Some terms of office may not be renewed. There will be no expectation of automatic transfer from the Balcarras GB to the trustees. We expect to be recruiting from a wider pool with future recruitment reflecting changing strategic needs. The Trust will avoid recruiting “in its own image.”	Ongoing	BR DLB Clerk	Ongoing
1.9 The trustees will also co-opt suitable persons to the board, as necessary, for a fixed term as appropriate	Ongoing	DLB BR ALL	
1.10 The Trustees will consider issues around diversity and representation when they consider the recruitment of new trustees and LGB members. The Trustees have decided to charge the MAT Development Committee with the task of overseeing this.	Ongoing	ALL	MAT Development Committee will oversee work on diversity. Are the Trustees/Governors representative of the schools they oversee? This issue was discussed at the AGM
2.The Trust in operation			
2.1 The trustees will meet formally at least 6 times per year as per calendar. These meetings will be concerned	From autumn 2020	Clerk	Trust meeting schedule set Trustee specialisms set

with strategic organisation and development for which all will be responsible. Each trustee will also have a specialist area of oversight.		All	
2.2 There will be a separate finance committee reporting to full board. Peter Horne is likely to Chair	From autumn 2020	PH Clerk	Finance, Audit and Risk Committee established and Chaired by Peter Horne. Terms of reference set
2.3 In year 1 there will be a steering group overseeing the development of the new school. Reporting to full board.	From autumn 2020	JM Clerk	MAT Development Committee established with Terms of reference. Chair now Jo Maguire Trust Development Committee is on standby to be convened when necessary
2.4 The above structure will be reviewed during year 1 as the needs of the trust evolve to decide how long the steering group remains in existence.	Spring 2021	All	Steering group has evolved into MAT Development Committee The Committee no longer has calendared meetings but can be convened where necessary
2.5 The trustees will also determine what other committees should be established and when.	On going and subject to annual review	All	So far we have the FAR Committee, The MAT Development Committee and LGBs for each school in the Trust We will continue to keep this under review

<p>2.6 The trustees will develop their training needs and organise accordingly.</p>	<p>Identify 2020 organise spring 2021</p>		<p>CEO has attended training course for new CEO's. B Roberts has attended training for new Chairs of Trust. Both programmes organised by the Regional Commissioners Office in the Southwest. Both were excellent</p> <p>Training needs to be reviewed as part of annual skills audit.</p> <p>GS and DLB met in Oct 22 to discuss. Training programme agreed for 2022-23. Training Session with Tim Gilson, CEO of the Athelstan Trust arranged for February 2023</p> <p>Strategic Safeguarding Training organised by DLB for the Board. Nov 2022</p>
<p>2.7 The trustees will adopt a range of policies to ensure the efficient running of the Trust. These fall into 2 categories:-</p>			
<p>2.8 Category 1 School level policies. Pre-existing school policies are being updated to be "Trust ready". It is anticipated these policies will be easily transferable to the new school. Final decisions to be made with head designate.</p>	<p>Summer/early autumn 2021 Spring 2021</p>	<p>DLB SMT</p>	<p>All statutory policies in place</p>

<p>2.9 Category 2 Trust level policies. We will adopt policies which reflect the guiding principles and values of the Trust. We will consolidate the thinking and preparation that has already taken place and provide a stable framework for the efficient discharge of our short and long term responsibilities.</p>	<p>Ongoing Finalise early autumn and by conversion. Trust policy document in development</p>	<p>BR DLB All</p>	<p>We are gradually moving policies to Trust level. Work ongoing</p> <p>Policy platform now in place.</p> <p>Final Policy review June 2023. Policy up to date</p>
<p>3. A)The Pupils in the trust</p>			
<p>3.1 We believe that every child in every school in the trust is of equal importance.</p>			<p>We have equally high aspirations for pupils at Balcarras and THSL</p>
<p>3.2 We want every child to be proud of the school they attend, to feel safe and able to reach their potential.</p>			<p>As above</p>
<p>3.3 We expect the highest possible standards of achievement, including measures of pupil progress in all its schools.</p>	<p>Annual review of performance but regular data updates</p>	<p>DLB/ Heads</p>	<p>Balcarras continues to be one of the very highest performing schools in the country. There is only 1 school in the Southwest that can match Balcarras' value added at GCSE and A level and only a handful nationally. We aim to achieve similar standards at THSL</p> <p>Examinations results in 2022 very positive.</p>
<p>3.4 We are aware that how we conduct ourselves and the quality of our decision making will have an impact,</p>			

however indirectly, on the lives of the pupils within our trust.			
<p>3.5 We will set up a simple, efficient system of information flow from the governors and heads of schools. This will enable trustees to understand each school's successes but also to have an "early warning" of any concerns that may require them to initiate intervention.</p> <p>At the Development Committee on 24.11.21 it was suggested that these reports should be standardised.</p>	<p>From autumn 2020 Ongoing</p> <p>DLB to standardise Headteacher's reports</p>	DLB BR	<p>Heads Reports to LGB are seen by Trustees. We have designed the scheme of meetings to ensure that this is made easier. DLB meets headteachers regularly.</p> <p>Standard form of report now established</p>
<p>3.6 We will initiate reviews as appropriate, to ensure that the structure of governance in each school is efficient; and also to test that each school's management structure at all levels provides value for money in terms of the best outcomes for pupils.</p>	Ongoing	DLB BR Head, SMT and Govs	<p>LGB structure established. We will need to continue to review it</p>
<p>3.7 All staff will be employed by the Trust and will be deployed wisely to provide the highest quality all round education for pupils.</p>		DLB/Heads	All new employees employed by the Trust
<p>3.8 We are concerned that the loss of education experienced by pupils as a result of the continuing pandemic is likely to impact on pupils in ways that are not yet fully evident. We will wish to be satisfied that the best available, appropriate "catch up" measures are in place in our schools.</p>	Ongoing from September 2020	DLB Heads SMT	<p>Both schools in the Trust have initiated a COVID Recovery strategy</p> <p>LGBs monitoring these strategies</p>
<p>3.9 Response to OFSTED Report into Sexual Abuse in Schools</p>	From June 2021	DLB/Heads/SMTs/Trustees/LGBs	Both schools have carried out a review of their safeguarding procedures in light of the OFSTED Report into Sexual Abuse. They have also developed responses to the Report.

			<p>These are being shared with LGBs and DLB reported to trustees in Dec 2021</p> <p>Pupil focus groups discussed the issues that came out of the report during summer of 2022. Finding fed back to LGB</p>
<p>3.10 Step up preparations for OFSTED inspection of Balcarras School and prepare for OFSTED inspection of THSL in 2023-24</p>	<p>Ongoing</p>	<p>DLB/SMT/LGB/Trustees</p>	<p>As an outstanding school Balcarras has been exempt from regular inspection. The school was last inspected in May 2014 and was judged to be outstanding in every category. It is critical that Balcarras retains its outstanding judgment.</p> <p>THSL will be inspected in year 3—2023-24</p> <p>Work ongoing</p>
<p>3.11 Continue to prioritise pupil wellbeing and safety particularly in light of the pandemic. The Trust will actively engage with its schools to ensure that measures are in place not just to ensure academic catch up but also to ensure that there is appropriate social catch up. This will include a Trust focus on issues around mental health</p>	<p>Ongoing</p>	<p>Trustees/DLB/Heads/DSLs Pastoral Leads, FGBs</p>	<p>Much of the work in this area will naturally be reported to the Trust. However, we will ensure that there is trustee involvement in the various initiatives set in train by LGBs</p>

Bernard Roberts has produced a document which seeks to offer a structure to this work			Review at Full Trustees on 7.12.21
<p>3.12 Annual Safeguarding Training for all Trustees and Governors</p> <p>At the Full Trust Meeting on 20.9.22 it was agreed that we should seek some enhanced training (on top of the standard safeguarding training) for trustees particularly regarding the strategic oversight of safeguarding across the trust.</p> <p>Other training such as Prevent, FGM to be sought through the year.</p>	By Christmas 2022	DLB to arrange possibly through Jane Bee Safeguarding	Done
<p>3.13 Standardised Process of Trust oversight of safeguarding to be agreed</p> <p>The Trust is confident that safeguarding procedures are robust in both of its schools and we currently receive minutes from the appropriate LGB committees. Each school in the Trust does an Annual Safeguarding Return and there are bi-annual external reviews of safeguarding. The Trust will develop a single checklist to be completed annually by the CEO and Safeguarding Trustee</p> <p>In light of Jane Bee safeguarding course perhaps we should adopt a Strategic Development Plan as regards safeguarding trust wide</p>	By Christmas 2022	DLB to oversee	<p>DLB to lead on this during 2022-23</p> <p>See minutes of safeguarding Summit Summer 2023</p>
3.14 The Staff in the Trust			
3.12 Just as we are committed to the highest standards of pastoral care for pupils so we are with the Trust's staff. We will ensure that employees are treated with respect at all times. This will include a focus on issues around workload, mental health and staff morale	Ongoing	DLB/Trustees/Heads/LGBs	From their regular contacts with the trust's schools and reports from the CEO, the trustees are well aware of the huge pressures that

particularly in light of the pandemic and its impact on the wider educational profession			staff within the trust are experiencing particularly since the pandemic. The trustees continue to recognise that a strong and highly motivated staff is the trust's most important asset.
3.15 The Trust Development Plan has CPD as an item under Point 8. However, it is crucial that it is mentioned here too because it is so central to the successful management of the Trust's staff	Ongoing	DLB/Trustees/Heads/LGB	Trustees to be regularly appraised of the Trust's CPD plans and provision. DLB to include on CEO Report
4. Financial management			
4.1 We are aware of our responsibility to spend the public money we have at our disposal wisely, creatively and efficiently.	Ongoing	All	In 2018 the DfE judged Balcarras to be in the top decile for efficiency when you consider £ spent/ per pupil/value added. We want this to continue to be the case
4.2 We are aware that there is concern about the financial practices of some existing trusts e.g. inflated salaries, contracts awarded inappropriately etc. We share these concerns and will install suitable checks and controls.	Autumn 2020 regular review	BR PH VWV PH BR DLB	Regular review ongoing. Are we confident that we are getting good value for money?
4.3 We are committed to delivering value for money in every area of activity within the trust. We will work with the funds available to target spending to achieve the best possible outcomes. Periodic reviews of spending patterns will establish cost benefits and added value.	Ongoing	DLB/MR PH BR Head Finance comm.	The Trust reviewed its spending in light of the SRMA Report. Considering that we have the highest value added (2017-19) for any post 16 Trust in the

<p>First stage: review Balcarras spending in response to SRMA report</p>	<p>November 2020</p>		<p>Southwest we are keen to protect our post 16 model. Likewise at GCSE our model is delivering the best value added in the region. When you take in to account the penalties which are directed at inclusive schools Balcarras is the worst funded school (£ per pupil) anywhere in the Southwest.</p>
<p>4.4 The Trust's financial and central services are based at, and operated out of, Balcarras School.</p>	<p>Ongoing Summer 2020</p>	<p>DLB/MR SMT</p>	<p>Appointment of new CFO has meant that this work can now begin in earnest.</p> <p>Nov 22 sees the latest rollout of these systems with the adoption of a new payroll system</p>
<p>4.5 Our top priority is to reach a final decision on personnel issues within the finance team with a view to establishing outstanding and sustainable financial management at whole trust level.</p> <p>Part of DLBs annual appraisal sets this as a specific target.</p>	<p>September 2020 and implement as soon as agreed.</p>	<p>PH BR DLB</p>	<p>We navigated this change very well. New CFO in place and doing a fine job.</p> <p>This will take some time and will need constant development as the Trust grows</p> <p>By Nov 22 we have invested a further 20k in our finance and payroll team. Roughly equivalent to the uptick in</p>

			<p>income provided by the growth of THSL.</p> <p>We have grown the team's hours again for 2023-24</p>
<p>4.6 We have already had extensive discussion and received advice from other trusts and will move imminently to finalise our policies with regard to the allocation of money to the Trust's schools e.g. top slicing; GAG pooling; the quantifying of shared resources is particularly relevant to year 1 of the new school on a shared site. We will establish a top slice that covers the cost of those activities that are centrally provided initially set at 3%</p>	<p>Autumn 2020 to early spring 2021</p>	<p>PH DLB BR Finance Heads</p>	<p>We've kept it simple and lean at the top and we should continue to follow this model. 3% top slice agreed</p>
<p>4.7 We have established a risk register. It will be reviewed and updated regularly</p>	<p>Ongoing</p>		<p>Risk register needs to be split between the schools and the Trust</p> <p>FAR oversees this work</p>
<p>4.8 Balcarras has been undergoing a full review of its support functions with a mind to these functions being able to support the activities of a trust. These include: the school management system, software for payroll and financial management, data tracking systems, arrangements for cashless catering, website and marketing, photocopying contracts. Any brand new schools which enter the trust will automatically adopt all of the trust's systems. Existing schools will be brought into line with all deliberate speed</p>	<p>Decisions taken June 2020.</p> <p>Ongoing review</p>	<p>DLB/SMT/Heads/Finance Comm</p>	<p>School management systems, data systems, financial management, websites, photocopying all harmonised across the trust. June 2023</p>
<p>4.9 Our external audit for September is already booked. After this cycle we will go out to tender (as is our usual practice every three years)</p>	<p>January 2021</p>	<p>DLB/PH/Finance Comm</p>	<p>External Audits have been tricky in a pandemic.</p>

			Tender process resulted in our move to Bishop Fleming
5. Alignment and growth of the Trust			
5.1 We believe that the Balcarras Trust will be a huge asset to the development of the schools system in the South West. We are ready to do everything we can to provide system leadership and to spread our educational philosophy as widely as we can.		DLB, TPC, Trustees	DLB is liaising closely with the Regional Director Office in Bristol. Regular contact and visits to the Trust
5.2 The Trust believes that for a school to be successful it must have its own strong and positive identity within the community it serves.			We have struck the right balance here so far.
5.3 We are aware from our preparations that different trusts operate different levels of alignment. Our current position is that there will be very close alignment with the new school. This will be popular locally because of respect for the Balcarras “brand” and will be an influential factor in establishing the success of the new school.			As above
5.4 As the Trust expands we will operate a system of earned autonomy with an underlying principle of shared values.	Ongoing	Trustees	Ongoing
5.5 Each school joining the Trust will have its own strengths and weaknesses. These will be analysed (due diligence) and the Trust would not expect to undermine a particular strength by insisting on full alignment. However, where this is deemed necessary appropriate steps will be taken.	Ongoing	Trustees DLB	Due Diligence document drawn up ready for use in the need. All trustees have inputted and will input if ever the situation arises.
5.6 We will also assess the future leadership and governance needs of each school that could potentially	Ongoing	DLB/BR/Trustees	As above

join the trust. Our dialogues with other Trusts have suggested that it is best to keep an open mind and not assume that a “one size fits all” approach is the only option.			
5.7 We are proud to have been chosen as the sponsor for the High School Leckhampton. As a sponsor academy we are open to the possibility of sponsoring other schools either existing or new free schools. DLB will maintain close links with the RSC.		DLB/Trustees/RSC/LA	DLB/Trustees open to discussions with RSC. Slowdown of the pandemic and Govt White Paper has accelerated discussions around MATs
5.8 Development of Trust Website and Brochure	By new year 2022	DLB/Trustees	Website now launched and looking good
6. The High school Leckhampton (new school)			
6.1 Opening a new school is a very exciting project and we are pleased to have responsibility for its growth and success.			THSL could not have been set up in any better way than the Trust has achieved
6.2 We have been very closely involved in the design of the school and this will continue via the steering group, who will also oversee the progress of the temporary facilities for year 1.	Ongoing to September 2022	Steering group DLB/JA/NAB	Temporary facilities delivered on budget and on time. Designs/plans for Farm Lane ongoing. This is a significant piece of work for HW, JA, IGD as well as DLB. Temporary facilities now converted for use by Balcarras Sept 2022
6.3 We believe that the best way to establish the success of the school is to appoint a headteacher who will have a high profile within the community.	Appointment process underway May 2020. Interviews October 2020	Appointment committee	Appointment Committee oversaw the process well and we got an excellent

	Head designate in post January 2021		result for the school and the Trust
6.4 We have already established good links within the community and will intensify our marketing strategy prior to Open Evening. Marketing will continue to raise profile ahead of each subsequent admissions process.	October 2020 Ongoing	Steering group DLB/New Head	DLB oversaw marketing well in period before HW's appointment. HWs leadership of marketing has been excellent. School is full on first preference as we start Year 3
6.5 We have already carried out in depth curriculum modelling, detailing staffing needs etc. We will finalise as soon as provisional pupil numbers are available and match appropriately to MFG funding.	Early spring 2021	Steering group, SLT, Head	Curriculum Model established. Continual review will be needed to ensure that it is affordable going forward.
6.6 We plan for some staffing overlap between Balcarras School and THSL in the early years particularly in year 1 when the site is being shared. We will manage contracts carefully and cost effectively whilst growing THSL to full capacity. The staffing overlap will include non- teaching staff e.g. admin, facilities, support.	Ongoing planning 20/21	Steering SLT Head	Complicated working arrangements but to the benefit of both schools.
6.7 Ensure that the school meets all statutory regulations and is judged good or better by OFSTED	Ongoing	HW/DLB/Trustees/LGB	The High School passed its pre-inspection by OFSTED with flying colours. Great work by HW School is readying itself for inspection in Year 3 Balcarras due as well
7. Accountability			

7.1 Most lines of accountability are already understood and ready to be implemented. These lines include: Trust/CEO/CFO; Trust/Governors; Trust/Governors/Heads including performance management.	Autumn 2020	Trustees/Governors/CEO/Exec Team	Systems now established. Let's keep them under review
7.2 Our Scheme of Delegation has been drawn up in conjunctions with our legal team. The Trustees will review the scheme of delegation regularly		Trustees	Annual review in June
7.2 Some further work with members desirable e.g. what level of interim reporting might they require between meetings.	September2020	Trust	More work needed. Has been difficult in the pandemic. Perhaps we should encourage visits into school
8. Commitment to Continuing Professional Development			
8.1 The Trust will be committed to the highest standards of professional development. We will invest in our staff and ensure that they have access to high quality CPD Opportunities			Excellent opportunities available internally through GLOW Maths and the Balcarras Teaching School Partnership but also through external links
8.2 The Trust will continue to prize the work of the GLOW Maths Hub. Liz Cullis will continue to line manage Steve Lomax (Maths Hub Lead) and the Trust will continue to have representation on the GLOW Maths Strategic Board	As now regular updates to the CEO/Trustees	DLB/EJC/Steve Lomax/Trustees	GLOW Maths continues to be one of the country's leading Maths Hubs. Steve Lomax takes over as Senior Lead from Sept 22 and Ed Neale as Maths Hub Lead.
8.3 The Trust will continue to benefit from the work of the Balcarras Teaching School, a collaboration of some 30 schools across the region			Our work as a Cohort 2 Teaching School has come to an end. However, the

			relationships that we developed continue to flourish
8.4 The Trust will put in a bid to be the Teaching School Hub for Gloucestershire. Bid to be drawn up by DLB/EJC in consultation with partner schools, the LA and the Trustees.	September 2020	DLB/EJC/Trustees	Success. We are the hub for our region. As of Sept 23 we have been a 'hub' for just over 2 years. All KPIs are being met
8.5 Annual Plan for INSET/CPD drawn up by the Trust and each school in the Trust. Opportunities for joint INSET e.g. Teaching School Conference explored	Annual	RJA/EJC/Heads	INSET plans drawn up for 2023-24 Both schools will meet at the end of Nov at Balcarras
8.6 Strategic review of leadership development/capacity across the Trust. Whilst this is ongoing it should also be formalised by the CEO reporting annually to the Trustees	Annual/Ongoing	DLB/Trustees	DLB sent report to Chair of Trust in October 21 Further papers sent to Trustees in September 22
9. Future needs and development			
9.1 We will expect to be briefed regularly and kept up to date about national and local policy and other relevant issues that may impact on the work of the Trust.	Ongoing	CEO SLT	DLB appraises trust regularly on key educational issues e.g. Funding OFSTED Reports Updates from Regional Office National policy developments
9.2 We will also review our own developmental needs as trustees and organise such speakers, visits and training	Ongoing Review annually	All	Training programme in place for 2022-23

to meet these needs thereby ensuring we are best placed to develop the Trust responsibly			Programme for 2023-24 needs to be agreed
9.3 We will arrange visits to other Trusts to supplement those that have already taken place with the Gloucestershire Learning Alliance, The Athelstan Trust, The Hanley and Upton Educational Trust, and the Bristol Cathedral Trust	Ongoing	DLB/Trustees	We have links to Athelstan, Bristol Cathedral and The Hanley Education Trusts.

CEO Final Review Comment on 2020-2023 Development Plan September 2023

It seems impossible to believe that we are now at the end of the first three year development plan of the Balcarras Trust. We set the Trust up in December 2020 during a global pandemic. I think we should look back on this achievement with great pride. The Trust is now firmly established and its schools are operating at a very high standard. We are in a position to take another school into the trust and its is likely that we will continue to grow modestly during the next three year development plan.

Our policy platform is now well established, and although it will need continual development, we now have a strong base from which to build.

Financially we are in a strong position and we have managed to invest in our schools whilst at the same time maintaining a substantial reserve.

Our profile as a ‘system leader’ could not be better. We run GLOW Maths, The Balcarras Teaching School Hub, and are the legal entity for GITEP. This means that the Trust is positioned at the very centre of all the key professional development initiatives that currently exist. We have put the Trust in a very strong position. This all to the benefit of the pupils who attend the trust’s schools.

I look forward to the next three years.

Chair of Trustees Comments September 2023

We have achieved a lot as a Trust over the last 3 years. Inevitably, some of the tasks we set ourselves at the outset are still ongoing; in the world of education there is a constant need to update policies and to ensure best practice. I am satisfied that we have overseen the successful launch and development of THSL without undermining the success of Balcarras School. As our Trust enters a new phase, our developmental focus shifts slightly towards ensuring that we have the best procedures and structures in place at the right time to consolidate the existing

strengths of our schools in an expanding Trust so that by working together we can create even greater opportunities and benefits for the students in our care.

Bernard Roberts September 2023

CEO Comment on Progress of Development Plan at November 2022

The first two years of The Balcarras Trust have just flown by. We have achieved much in a short space of time. I think the key achievements are:

- The setting up of a brand-new secondary school—The High School Leckhampton-- which is full on first preference and significantly over-subscribed. The Trust's strategy around this has worked well and the crucial appointment of Helen Wood has clearly paid off.
- Both schools in the Trust are schools 'of choice'
- The Trust has established its legal footprint and policy platform well. Of course this is ongoing work
- We continue to adapt to life in a post pandemic world. There is no doubt that this continues to put pressure on the Trust and its staff
- Significant work has been done by the Trust and its LGBs to support the increased issues around pupil mental health
- The Trust's central service operation is working well. We have successfully scaled it up as the Trust has grown
- The Trust's website is running and looks good
- The Trust through Balcarras School has won the contract to run the Teaching School Hub for Cheltenham, Stroud and the Cotswolds. This is a significant responsibility. As of November 2022 it is work that is progressing well. However, we must not under-estimate the scale of this responsibility
- The Trust through Balcarras School continues to operate GLOW Maths which has an income of c£900,000. We have now operated GLOW for 8 years. It is one of the most successful Maths Hubs in the country. In October 2022 we were contacted by the DfE to inform us that following their annual inspection of our data we continued to meet the criteria set by the DfE. During 2021-22 we had a complete re-organisation of GLOW Maths. This has been hugely successful and the Hub is now set fair for the future. Steve Lomax continues to be central but now in a new position as Senior Lead. Ed Neale is the new Maths Hub lead
- The Trust has a high profile in the region and nationally
- The Trust has considered carefully the issues around growth. It is highly likely that Winchombe School will join the trust and we are also in discussions with a number of other schools

Key issues during the next 12 months

Despite all of these successes there are of course key issues that we need to focus on:

- We need to develop a system for reviewing policy
- We need to continue to upscale the Trust's central services capacity commensurate with the growth in income
- We need to continue to think strategically about the growth of the Trust. A number of schools are now expressing interest in joining a Trust
- We should consider implementing a Trust Wide Strategic Development Plan relating specifically to safeguarding
- We are implementing a Trustees training programme for 2022-23. We should review it at the end of the year

DLB 15.11.22

Chair of Trustees Comment November 2022

It would be premature to suggest that schools are getting back to normal after the upheavals of the last 2 years. Nevertheless, there is a sense that we are making good progress.

Both the Trust's schools have been skilfully led and are robust institutions with great clarity of purpose. There is a very evident sense that pupils enjoy coming to schools where they feel safe and know that they are being well educated and have fantastic opportunities for extra curricular activities.

We are fortunate to have such dedicated school leaders. It is a pleasure to record here my formal thanks to Dominic Burke for the work he does in his dual role as head and CEO. I also wish to record my thanks to Helen Wood, to Tom Cadogan who is doing great work behind the scenes, and to my fellow trustees who have supported me during the last year when the trust has been considering its future as a potentially larger body.

The opening of THSL on its own site is undoubtedly a significant moment for our trust and as trustees I think we can be proud of the support we have given and will continue to give to this wonderful new school. However, we are very aware of the many challenges that now lie ahead for us as we enter the third year as a MAT.

Bernard Roberts 17.11.22

CEO Comment on Progress of Development Plan at October 2021

We have made excellent progress towards the delivery of the initial development plan and as the year has progressed, we have added additional targets. I am convinced that our development plan should exist in this way, constantly adapting and changing as new priorities emerge. When we first set out to create the Balcarras Trust as far back as 2017, we could not have imagined that we would do so in the midst of a pandemic. The pandemic has had an

enormous impact on our society. It should be no surprise that schools have been hit hard by this. The Trust should be careful to understand and appreciate the impact that this has had on students, teachers, and support staff across our schools. I believe the Trust should prioritise the wellbeing of young people and that it should be a constant feature of our work going forward. Likewise, the Trust should be aware of the pandemic's impact on staff. I do not believe that there is a good understanding nationally as to the state of the morale in the profession. We would be wise to prioritise maintaining and enhancing this morale as we look to take the Trust forward. The staff will always be our most crucial asset. I am grateful that the Trustees understand this well.

In the same way, I believe that we should be aware of the impact that financial cutbacks have had on schools. Sixth Form funding has been cut by 37% in the last ten years and our overall income is down by 12%. We are running Balcarras School with 10 fewer teachers than we were 10 years ago. At the same time the cost of everything has risen and the demands on schools have increased. To give one example the demand to see the school counsellor at Balcarras has more than trebled. We would be wise not to dismiss this. Doing more with less is always a dangerous strategy because it risks blowing a gasket unless some other priorities are abandoned. We should re-double our efforts to argue for increased funding post 16, a reform of the funding model 11-16, which is simply not fit for purpose, and an end to the iniquitous situation where schools are punished for being inclusive.

As regards the Trust I think we should be extremely proud of what we have achieved. The new secondary school for Cheltenham is the biggest educational development in the town since the re-organisation of secondary provision in 1986, which of course was the year that Balcarras was created. Our work in bringing it to life has been high energy, frenetic, fraught at times, but great fun overall. It has allowed us to channel so much positive energy and the value it has created in bringing colleagues on at Balcarras is beyond calculation. It has also meant that we have brought in excellent new colleagues such as Helen Wood. The arrangements for Year 1 are working well although I am sure that THSL will feel liberated when they move to their own fabulous site at Farm Lane.

The development of that site has been, and continues to be, one of the Trust's finest achievements. For such a small Trust we should be immensely proud of the way we have shaped the project, always adamant that the children should have the very best facilities that we could arrange for them. Last academic Year I wrote to John Gorman to thank him for his great skill in leading the Design Team Meetings on behalf of Kier. He wrote back: *"When I first met the Balcarras team, I too was confident that this project would be successful. Your team took part in a very busy programme of meetings with the right mixture of professionalism and humour. I was very impressed with the contribution from everybody. This is an alien environment to some and can be overwhelming; the Balcarras team were more than able to meet the challenges. The balance between being led and leading is also often hard and I consider that the whole team got that aspect right."*

We did all of this (and continue to do so) on a shoestring budget. No private sector company could possibly have delivered what the Trust has in this way, and we should be proud of that. Jeff Arris has been central to this work, as has Ian Davidson.

Since January 2021 Helen Wood has taken over many of the responsibilities as regards the development of THSL. It was a great moment of relief for me personally when she took up post. She is already a superb Head and I look forward to working with her over the coming years. Each headship is different,

but I think we should appreciate what a tricky job launching a new school is, particularly doing so on the site of an existing school. Very recently Helen made contact with a lead HMI in the Southwest, and he said that in his experience what we are doing is unique. We will have to be very careful to ensure that we have enough capacity in place to deliver our part of the preparations for Farm Lane.

Whilst we have achieved much in this first 10 months of the Trust, there is still much work to do. We want to quickly develop a web presence, not least because it will make the explanation of governance easier on the website of THSL and Balcarras. A new website will also allow us to showcase the Trust. We are open to the possibility of growth and we should step up our conversations with local schools.

Financially the Trust is on solid foundations with a sizeable reserve. This is thanks in large measure to the senior staff and governors of Balcarras School who managed the school's finances with great care, even as austerity hit, so that the school never recorded a deficit position. Peter Horne deserves great credit for this as does Martin Reeves, Neil Baxter and all those governors/trustees who sat on that committee over many years. It is worth mentioning as well, the lasting contribution of Chris Healy, who left a reserve of around £500,000 when he retired. Stewardship of the Trust's finances will now be led by Tom Cadogan, who alongside Helen, was the most significant appointment we made this last year. Tom has made a great start in his role as CFO and I am convinced he will make a lasting contribution to the Trust.

We have done plenty of work on policy, but it is not yet complete (and probably never will be!) We should look to now ensure that we have a full suite of new HR policies alongside the statutory ones that we have already adopted. I am grateful to all of the Trustees for their willingness to work on this aspect.

I really benefited from taking part in the CEO's training programme led by Brian Hooper (Former CEO in the Southwest). I arranged a one to one meeting with him and one of the pieces of advice he gave really stuck with me. He said that it was absolutely vital for the future success of the Trust that Balcarras continues to be seen as an outstanding school in its own right. I believe he is absolutely right and I think we should ensure that Balcarras is ready for its OFSTED inspection whenever that takes place.

I am convinced that school should be good fun both for the students and the staff. We should continue to prioritise this going forward—in all of the Trust's schools. If young people are engaged in their education, then the rest is a lot easier to achieve. Our outcomes academically are amongst the very best nationally. Let's keep it that way.

DLB 20.10.2021

Chair of Trust Comment October 2021

It is a privilege to be the first chair of the newly formed Balcarras Trust. I wish to convey my thanks to my fellow trustees for the huge commitment they have made since well before the Trust came into being. Their shared vision, wisdom, energy and sense of civic duty have been central to our success. A brand new secondary school for Cheltenham! What an achievement. We could not have achieved this without

the determination, skill and ambition of Dominic Burke who has become our CEO as well as the head of Balcarras School. I am happy to record this here, officially.

My fellow trustees will know that with Dominic Burke at Balcarras and Helen Wood at The High School Leckhampton, we are fortunate indeed to have 2 of the finest heads in the country leading our Trust's schools. They are at different, but still early stages of their careers in headship and as trustees we look forward to supporting them in their further development within the Trust. We have also been pleased to welcome Tom Cadogan as our new CFO and Kate Shepherd as our Clerk. Their influence in helping us to progress is already evident.

Now, it is time to look forward. There is still work to be done nurturing the new school whilst delegating to it the necessary powers and authority, within the Trust, to ensure its pupils receive an outstanding education.

But we must also look beyond what has, necessarily, been our main remit for the last 3 years. We have already begun the serious discussions about how the Trust should expand but there is further work to do. We need to have the right systems in place and proper capacity to ensure success. We will continue to focus on ensuring outstanding pupil achievement within the Trust's schools, understanding that this can only be fully achieved if we are committed also to ensuring the safety, welfare and happiness of everyone involved with the Trust at every level.

B. S. Roberts

Chair of Trustees 21.10.2021